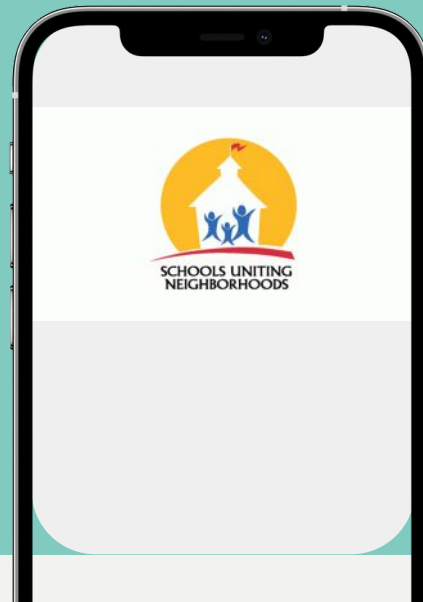




Grouptrail P-3 Overview

Training Handbook for P-3 Programs 2026-2027



Last Updated on September 2026



County SUN System Training and Support Resources

- **For New User Access and/or Training use [this form](#)**
 - https://docs.google.com/forms/d/e/1FAIpQLScJ6IJucyAdu_hKMjA5vuBD0AIEGFa-NyRU8ztoqE85O1raSg/viewform
- **For Multnomah County Grouptrail Handbooks**
 - <https://multco.us/info/sun-community-schools-handbooks>
- **For Grouptrail SUN Community School YouTube Page**
 - https://www.youtube.com/playlist?list=PLT3mjva75FQgGFTTnhXgRH37VgIm_Dn9_
- **For Grouptrail Help Articles**
 - https://scribehov.com/o/3j_CNcdJRH2L0NWUYiSi2w/page/SUN_Community_Schools_Grouptrail_help_articles_for_SUN_Site_staff__OPY2X5IJQc6Nb04UUiFzXg?back_to=%2Fworkspace%23documents__PA1L_HXMR-mTxPKA16ZIVQ
- **For assistance with WellSky Community Services and/or**
Grouptrail email: yfsdatasupport@multco.us



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Staff Workflow: Creating a New P-3 participant (Through the one-page creation forms)

Please Note:

This process reviews how to create a new P-3 participant in Grouptrail and what important field to select to identify if a participant is attached to a P-3 program



Creating a New P-3 participant through the one-page creation forms (Step 1)

To manually create a participant workspace, select **“Participants”** in your navigation window

The screenshot displays the Grouptrail web application interface. On the left is a vertical navigation sidebar with a header 'Welcome Rob!' and a hamburger menu icon. The sidebar contains a search bar with 'Home' entered, a 'Browse' dropdown, and a list of menu items: 'Activities', 'Account Holder (Parent/Gua...', 'Participants' (highlighted with a purple box and a purple arrow pointing to the text '“Participants”' in the overlay), 'Grouptrail Announcements, ...', 'Reports', 'Site management', 'My Sites', and 'My Account'. At the bottom of the sidebar is a 'Sign Out' button. The main content area has a header 'Home' and an 'Add New' button. Below the header is a light blue announcement banner with a megaphone icon, the text 'Welcome! / ¡Bienvenidos!', an 'Update' button, and a list of links for account holders, parents, and staff. At the bottom of the main area is a dark grey banner with the text 'FY27 Grouptrail Announcements and Updates'.

Welcome Rob! Home

Home

Browse

Activities

Account Holder (Parent/Gua...

Participants

Grouptrail Announcements, ...

Reports

Site management

My Sites

My Account

Sign Out

Home

+ Add New

Welcome! / ¡Bienvenidos! Update

In the new version of Grouptrail v11, you no longer need the additional student registration form linked at the top. Parents/Guardians can more easily add students at any time!

- Account holder/parent/restricted user help articles: [Create an account and register](#), [Adding an additional participant](#), [Find activities and request enrollment](#)
- [Use this link](#) to test the full account holder/parent/restricted user workflow experience from registration to enrollment.
- And here are staff help articles: [How to create a new participant or activity](#), [Connect a new parent to an existing student record](#), [Marking duplicates for deletion](#), [Viewing staff reports](#), [Taking activity attendance](#), [Enrolling participants](#), [Frequently asked questions](#)

> FY27 Grouptrail Announcements and Updates



Creating a New P-3 participant through the one-page creation forms (Step 2)

Once you're in the **"Participants"** Menu view, click the icon called: **"Add New"** in the right hand corner to locate the one-page creation form

The screenshot shows the Grouptrail interface. On the left is a sidebar with a 'Welcome' message and a list of menu items: Home, Browse, Activities, Account Holder (Parent/G...), Participants, Grouptrail Announcement..., Reports, My Sites, and My Account. The 'Participants' menu item is highlighted. The main content area is titled 'Participants' and contains three expandable sections: 'P-3 Participants (These are participants with a P-3 School Year of: 2026-2027)', 'Participants (Active)', and 'Participants (Inactive)'. In the top right corner of the main content area, there is a button labeled '+ Add New', which is highlighted by a purple circle and a line pointing from the text in the previous block.



Creating a New P-3 participant through the one-page creation forms (Step 3)

Once you have selected the “Add New” icon, you will now click on “Participants”

Once clicked, you will be redirected to the participant one-page creation form

Important Note:

Be sure not to “Add a New Tracker” instead of clicking on Participants.

The screenshot shows the Grouptrail interface. On the left is a sidebar with a 'Welcome' message and a list of navigation items: Home, Browse, Activities, Account Holder (Parent/G...), Participants, Grouptrail Announcement..., Reports, My Sites, and My Account. The 'Participants' item is highlighted. The main content area is titled 'Participants' and features a '+ Add New' button in the top right. Below this button are three expandable sections: 'P-3 Participants (These are participants with a P-3 School Year of: 2026-2027)', 'Participants (Active)', and 'Participants (Inactive)'. A purple line originates from the 'Participants' button in the sidebar and points to the 'Participants' button in the top right corner of the main content area.



Creating a New P-3 participant through the one-page creation forms (Step 4)

1. Once you have selected the one-page creation form, you will fill it out in its entirety. They're some fields that are **required** in order to submit the form

2. When **creating a P-3 Participant** (adult or child) it will be **important** to acknowledge the field labeled

- **P-3 Participant? (Select Academic Year): P-3 ONLY**
- Make sure to select the correct academic year for your P-3 Participant
- Each year the P-3 Participant field will need to be selected with the new academic year (This will need to be done for new and returning P-3 participants)

3. Once you fill out the form you will click “Add Workspace” at the bottom. You will be asked to “**view the workspace**” or given the option to **create another participant**

Please Note:

Users should only add the “P-3 Participant School Year” for the year the student or adult will be served in

Add new: Participants

Student's First Name:

Student's MI:

Student's Last Name:

SUN Site *

Type of Participant *

Current Grade Level *

Date of Birth *

Gender *

If Other Gender, Specify

Email (Custom)

Primary language spoken at home

Inclusive Identity *

Student State ID # (SSID)

Has your child experienced homelessness factors?

Risk factor (Yes/No)

Release to Participate Granted for 2026-2027 *

Release of Information Granted for 2026-2027 *

Photo Release Granted for 2026-2027 *

Accept Non-Discrimination & Behavioral Expectations

Parent 1

Agency Client ID

Parent 2

Teacher/Counselor

[School] Enrollment Status *

Primary Contact Name

Primary Contact Number

Email

Emergency Contact 2 Phone

Emergency Contact 2 Relationship

Primary Method of Transportation

Secondary Method of Transportation

People who are authorized for pick up:

Agency Client ID

P-3 Participant? (Select Academic Year): P-3 ONLY

☐ 2024-2025

☐ 2025-2026

☐ 2026-2027

Done

Registering for EKT or Leap into Kinder?

If yes, what was the name of the Head Start?

If yes, what was the name of the school?

Child is receiving special education services

Cancel Add workspace



Staff Workflow: Creating a New P-3 activity (Through the one-page creation forms)

Please Note:

This process reviews how to create a new P-3 activity in Grouptrail and what important fields to select to identify if an activity is attached to a P-3 program



Creating a new P-3 activity through the one-page creation forms (Step 1)

To create a workspace, select
“Activities”
in your
navigation
window

The screenshot displays the Grouptail web application interface. On the left is a vertical navigation sidebar with a light beige background. At the top of the sidebar, it says "Welcome Rob!" followed by a hamburger menu icon. Below this are several menu items: "Home" (with a house icon), "Browse" (with a folder icon and a dropdown arrow), "Activities" (highlighted with a purple box and a purple line pointing to the text "Activities" in the main content area), "Account Holder (Parent/Gua...", "Participants", "Grouptail Announcements, ...", "Reports" (with a document icon), "Site management" (with a gear icon), "My Sites" (with a globe icon), and "My Account" (with a person icon). At the bottom of the sidebar is a "Sign Out" button with an arrow icon. The main content area has a white background. At the top, it says "Home" on the left and a dark blue button with a white plus icon and the text "Add New" on the right. Below the header is a light blue notification banner with a megaphone icon, the text "Welcome! / ¡Bienvenidos!", an "Update" button, and a close "x" icon. The notification text reads: "In the new version of Grouptail v11, you no longer need the additional student registration form linked at the top. Parents/Guardians can more easily add students at any time!" followed by a list of links: "Account holder/parent/restricted user help articles: [Create an account and register](#), [Adding an additional participant](#), [Find activities and request enrollment](#)", "Use [this link](#) to test the full account holder/parent/restricted user workflow experience from registration to enrollment.", and "And here are staff help articles: [How to create a new participant or activity](#), [Connect a new parent to an existing student record](#), [Marking duplicates for deletion](#), [Viewing staff reports](#), [Taking activity attendance](#), [Enrolling participants](#), [Frequently asked questions](#)". Below the notification banner is a dark grey button with a white right-pointing arrow and the text "FY27 Grouptail Announcements and Updates".



Creating a new P-3 activity through the one-page creation forms (Step 2)

Once you're in the “**Activities**” Menu view, click the icon called: “**Add New**” in the right hand corner to locate the one-page creation form

The screenshot shows the Grouptrail web interface. On the left is a sidebar menu with options: Home, Browse, Activities, Account Holder (Parent/G...), Participants, Grouptrail Announcement..., Reports, My Sites, and My Account. The main content area is titled 'Activities' and contains a list of activity categories, each with a right-pointing arrow icon:

- › P-3 Activities (These are activities that have "Yes" identify for the field called: Is this a P-3 Activity): 2026-2027
- › Providers> All Activities Fall SUN 2026
- › Providers> All Activities Summer SUN 2026
- › Providers> FY26 All Activities (2025-2026)

In the top right corner of the main content area, there is a button labeled '+ Add New'. A purple line with circular endpoints at both ends connects the text in the paragraph above to this button, indicating the next step in the process.



Creating a new P-3 activity through the one-page creation forms (Step 3)

Once you have selected the “Add New” icon, you will now click “Activities”

Once clicked, you will be redirected to the activity one-page creation form

Important Note:

Be sure not to “Add a New Tracker” instead of clicking on activities

The screenshot shows the Grouptrail user interface. On the left is a sidebar with navigation links: Home, Browse, Activities, Account Holder (Parent/G...), Participants, Grouptrail Announcement..., Reports, My Sites, and My Account. The main content area is titled 'Activities'. In the top right corner of this area is a green '+ Add New' button. A purple line from the text 'you will now click “Activities”' points to a dropdown menu that appears after clicking the button. This menu contains two options: 'Tracker' (with a grey circle icon) and 'Activities' (with a document icon and a purple border). Below the menu, there are four dark grey buttons with white text: '> P-3 Activities (These are activities that have “Yes” identify for the field called: Is this a P-3 Activity): 2026-2027', '> Providers> All Activities Fall SUN 2026', '> Providers> All Activities Summer SUN 2026', and '> Providers> FY26 All Activities (2025-2026)'.



Creating a new P-3 activity through the one-page creation forms (Step 4)

1. Once you select the one-page creation form, you will fill it out in its entirety. They're some fields that are **required** in order to submit the form

2. When filling out the activity details, they're **two fields** that are extremely **important** for P-3 programs to select the **correct option** for when creating a **P-3 activity** in Grouptrail:

- **Activity Subject**
- **Is this a P-3 Activity (P-3 Only)**

3. P-3 coordinators should make sure to select the correct activity subject for their P-3 activity

-) **Example 1:** The P-3-Play and Learn activity subject should be the only option selected if you're creating a P-3-Play and Learn activity

-) **Example 2:** The P-3-Parent Cafe activity subject should be the only option selected if you're creating a P-3-Parent Cafe activity

-) **Example 3:** The activity subjects for P-3-Parent Engagement, P-3-Family Engagement, P-3-Recreational Activities should be the correct options selected for any activity that is not directly a Parent Cafe or Play and Learn activity

Add new: Activities

Name *

Provider *

SUN Site *

Activity Subtitle

Activity Description

Activity Term *

Start Date *

End Date *

Start Time *

End Time *

Max enrollment

Max waitlist

Current Grade Level *

Activity Category *

Activity Subject *

Activity Category *

Target Participant *

Time offered *

Recurring Weekly Schedule *

Location

Partners

Enrollment Type *

Activity Subjects

- ☐ SUN-Culture Activities/Social Studies
- ☐ SUN-Cultural Specific
- ☐ SUN-Entrepreneurial/ Business
- ☐ SUN-Environmental
- ☐ SUN-Family Involvement
- ☐ SUN-Financial Literacy
- ☐ SUN-Gender Specific
- ☐ SUN-Health/Nutrition
- ☐ SUN-Mathematics
- ☐ SUN-Parenting
- ☐ SUN-Reading/Literacy
- ☐ SUN-Recreational Activities
- ☐ SUN-Sports
- ☐ SUN-Science (STEM)
- ☐ SUN-Youth Leadership
- ☐ P-3-Recreational Activities
- ☐ P-3-Play and Learn
- ☐ P-3-Parent Cafe
- ☐ P-3-Parent Engagement
- ☐ P-3-Family Engagement
- ☐ RSD-Kinder Enrichment/Recreational
- ☐ RSD-Kinder Family Engagement

Is this a P-3 Activity?

Select...

—

Yes

Cancel Add workspace

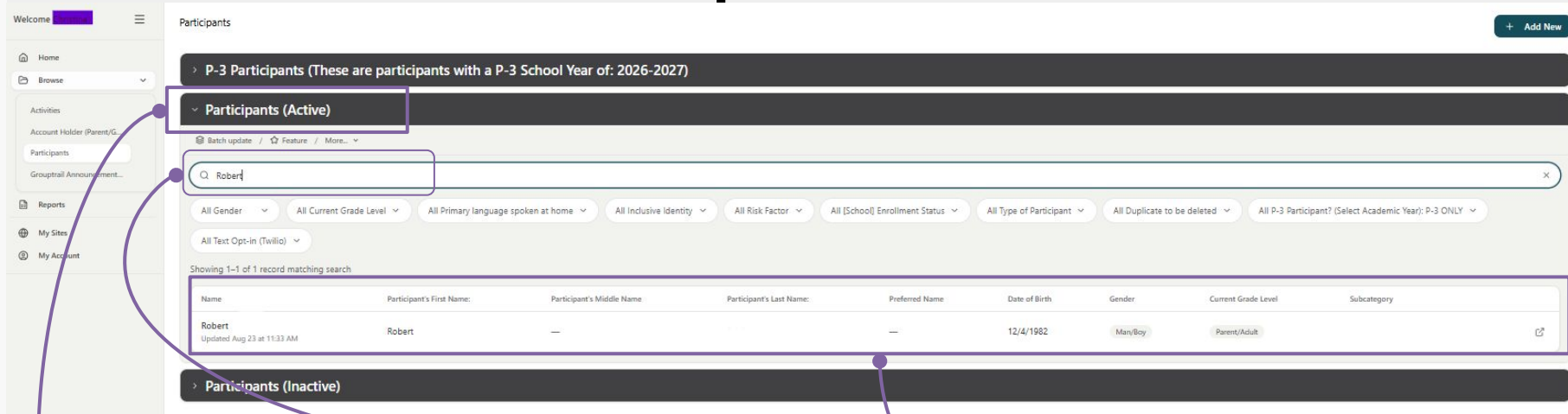


Staff Workflow: Updating Required Fields For An Existing or Returning P-3 Participant

Please Note:

This process reviews how to update required fields for an existing or returning P-3 Participant in Grouptail. This process is required in order to accurately count the number of P-3 participants being served at a P-3 site

Step 1) Search up the participant and click their profile



The screenshot shows the Grouptrail interface. On the left is a sidebar with navigation links: Home, Browse, Activities, Account Holder (Parent/G...), Participants, Grouptrail Announcement..., Reports, My Sites, and My Account. The main content area is titled 'Participants' and has an 'Add New' button. Below the title, there's a section for 'P-3 Participants (These are participants with a P-3 School Year of: 2026-2027)'. Under this, there's a 'Participants (Active)' section. A search bar is visible with the text 'Robert' entered. Below the search bar are several filter buttons: All Gender, All Current Grade Level, All Primary language spoken at home, All Inclusive Identity, All Risk Factor, All [School] Enrollment Status, All Type of Participant, All Duplicate to be deleted, and All P-3 Participant? (Select Academic Year: P-3 ONLY). Below the filters, it says 'Showing 1-1 of 1 record matching search'. A table lists the participant: Robert, with details like Date of Birth (12/4/1982), Gender (Male/Boy), and Current Grade Level (Parent/Adult). Below the table is a 'Participants (Inactive)' section.

Step 1:

To **update** the **required field** for an **existing** P-3 participant the first step is to locate the participant(s) that you would like to update this information for

To do this, **go to your “Participant (Active) tracker”** and find the participant you need to update the field for

This tracker will contain every SUN record that is linked directly to your school

Step 2:

Once you have opened your participant tracker, you can then use the **keyword search field** to enter the name of the participant you need to update the field for

Step 3:

Once you have found the participant you need to update this information for, **select** the participant **profile**

Please Note:

Users can use the following in their tracker search bar to find participants

- 1) First name, Middle Name or Last Name
- 2) A combination of characters
- 3) SSID Number
- 4) Workspace Number



Step 2) Locate and update P3 fields

Locate the required P-3 participant question which is called:

- **P-3 Participant? (Select Academic Year): P-3 only**

This field can be found towards the bottom of the page for the participant

Once you have found the field, please update it to the new academic year listed

Please keep in mind that the P-3 academic year for returning P-3 participants will need to be updated annually

The new P-3 Participant Academic Field will be updated every July 1st once the new fiscal cycle begins

Please Note:

It will be important to not deselect the previous year if a P-3 participant participated in your program in the year prior(s)

For any new P-3 participant, you should just select the new school year and leave previous year selections alone

Robert Lazenby (4/3)

Linked Account Holder (Parent/Guardian): bill (test parent)

Subcategory: Clear Creek Middle School

Date of Birth: 07/10/2013

Mobile Number:

DETAILS/DETALLES | **ENROLLMENT** | **FILES/ARCHIVOS** | **MESSAGES/MENSAJES**

Emergency Contact 1 Relationship:

Emergency Contact 2 Name:

Emergency Contact 2 Phone:

Emergency Contact 2 Relationship:

Primary Method of Transportation:

Secondary Method of Transportation:

List authorized people for pick-up:

Allergies:

P-3 Participant? (Select Academic Year): P-3 ONLY:

Text: Opt-in (Twilio):

Registering for EKT or Leap into Kinder?:

Did child attend Head Start?:

If yes, what was the name of the Head Start?:

Did child attend preschool or kindergarten?:

If yes, what was the name of the school?: N/a

Child is receiving special education services: No

None selected

☐ 2024-2025

☐ 2025-2026

☒ 2026-2027

Save **Cancel**



Staff Workflow: Updating Required Fields For An Existing P-3 Activity in Grouptrail

Please Note:

This process reviews how to update required fields for an existing P-3 activity that a P-3 coordinator has created in Grouptrail. This process is required in order to accurately capture P-3 data in Grouptrail reports



To **update** the **required fields** for **existing** P-3 activities the first step is to locate the activity that you would like to update this information for

Once you have found the P-3 activity you need to update this information for, **select the activity profile**

Once you have identified your P-3 activity you need to update the required fields for, the next step is to locate the required P-3 activity fields to update which will be:

- **Activity Subject**
- **Is this a P-3 Activity (P-3 Only)**

Important Note:

When updating activity subjects for your existing P-3 activity, please select the correct subject for your P-3 activity:

-) **Example 1:** The P-3-Play and Learn activity subject should be the only option selected if you're creating a P-3-Play and Learn activity

-) **Example 2:** The P-3-Parent Cafe activity subject should be the only option selected if you're creating a P-3-Parent Cafe activity

-) **Example 3:** The activity subjects for P-3-Parent Engagement and P-3-Family Engagement should be the correct fields selected for any activity that is not directly a Parent Cafe or Play and Learn activity

Updating required fields for existing P-3 activities

P-3 Play & Learn 23-24 (summer) 🔒

Provider: Immigrant & Refugee Community Organization ✓

Subcategory: Powell Butte Elementary ✓

Start Date: 07/07/2023 ✓

End Date: 07/28/2023 ✓

Max enrollment: ✓

[DETAILS/DETALLES](#) [SIGN UP](#)

Activity Category:

Activity Subject:

Target Participant:

Age range:

Time offered:

Frequency :

Recurring Weekly Schedule:

Start time:

End time:

Teacher/Counselor:

Location:

Is this a P-3 Activity (P-3 Only)

Activity Subject Options:

- ☐ None selected
- ☐ SUN-Canceled
- ☐ P-3-Play and Learn
- ☐ P-3-Parent Cafe
- ☐ P-3-Parent Engagement
- ☐ SUN-Gender Specific
- ☐ SUN-Recreational Activities
- ☐ SUN-Reading/Literacy
- ☐ P-3-Family Engagement

Is this a P-3 Activity (P-3 Only) Options:

- ☒ Yes

Submit



4.1) O&O P-3 Progress Summary Report

Please Note:

This section reviews how to generate and run the 4.1) O&O P-3 Progress Summary Report in Grouptrail.

4.1) O&O P-3 Progress Summary Report

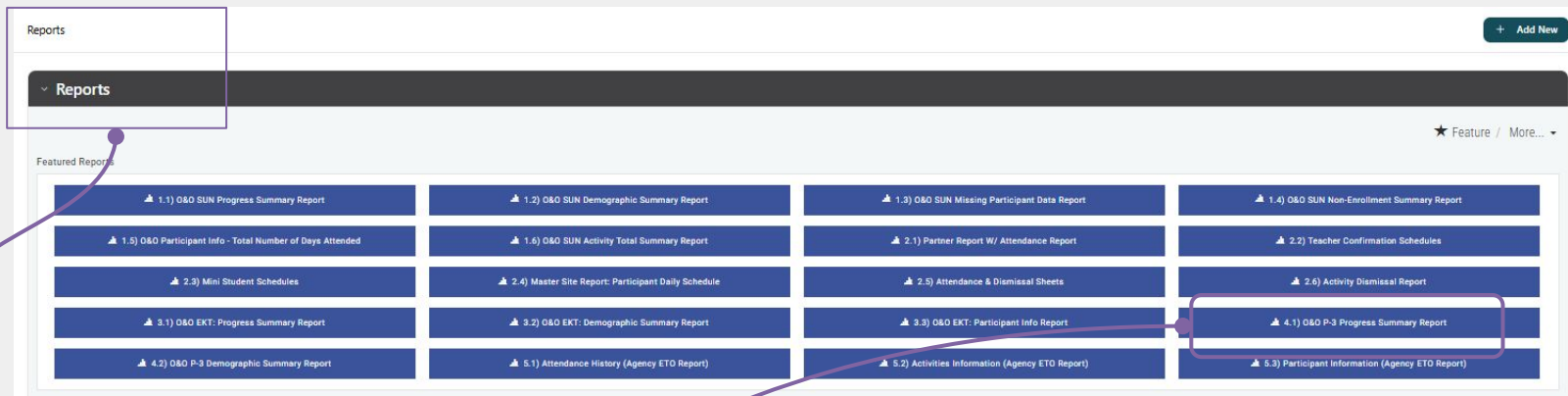
Reporting Context:

- This report in Grouptrail allows a user to check their current outputs in the system to understand the number of adults and children served for P-3 related activities
- This report includes four tabs that measure P-3 outputs
 - P-3 Overview Summary
 - P-3 Play & Learn Summary
 - P-3 Parent Cafe Summary
 - Participant Details Tab
- The tab called “**Participant Details Tab**” will provide a list of all participants that have been served in some type of P-3 activity
 - This tab can also serve as a missing data report for a P3 site. This tab will highlight in yellow any required fields that are missing
- The report will take a user anywhere between 30 seconds to one minute to download
- If a user has multiple school access and generates this report for a long date range then the report may download within 1 to 4 minutes
- This report contains Excel formulas meaning if a user clicks into a cell then it may break the data being viewed by the user
 - To avoid this issue, a user can copy and paste just the values in the report into a new Excel tab or Google Sheets
 - Here is quick YouTube video to demonstrate how to copy and paste values without formulas:
<https://www.youtube.com/watch?v=E2qBofQrAXY>

Step 1) Click on 4.1) O&O P-3 Progress Summary Report

To Generate the 4.1) O&O P-3 Progress Summary Report, go to your **Report Tracker** and click the correct report:

4.1) O&O P-3 Progress Summary Report



Reports

+ Add New

★ Feature / More...

Featured Reports

▲ 1.1) O&O SUN Progress Summary Report	▲ 1.2) O&O SUN Demographic Summary Report	▲ 1.3) O&O SUN Missing Participant Data Report	▲ 1.4) O&O SUN Non-Enrollment Summary Report
▲ 1.5) O&O Participant Info - Total Number of Days Attended	▲ 1.6) O&O SUN Activity Total Summary Report	▲ 2.1) Partner Report W/ Attendance Report	▲ 2.2) Teacher Confirmation Schedules
▲ 2.3) Mini Student Schedules	▲ 2.4) Master Site Report: Participant Daily Schedule	▲ 2.5) Attendance & Dismissal Sheets	▲ 2.6) Activity Dismissal Report
▲ 3.1) O&O EKT: Progress Summary Report	▲ 3.2) O&O EKT: Demographic Summary Report	▲ 3.3) O&O EKT: Participant Info Report	▲ 4.1) O&O P-3 Progress Summary Report
▲ 4.2) O&O P-3 Demographic Summary Report	▲ 5.1) Attendance History (Agency ETO Report)	▲ 5.2) Activities Information (Agency ETO Report)	▲ 5.3) Participant Information (Agency ETO Report)

Step 2) Enter the date range you want to look at and click **Generate report**. Open the report in Excel.

Fill out the report prompt section by putting the **start** and **end** date you would like to generate data for (**Example: Just 1st, 2024 to May 20th, 2025**)

Once your dates are enter, click **"Generate Report"**

Please Note: You do not need to change any of the filter options on the report prompt. You will only need to enter a "Start and End Date in the **date range fields**"


P-3 Program Outputs and Outcomes (Excel Version 2024)
×

Filters

Filter date

Date of Activity

Range

Custom

From:

2024-07-01

To:

2025-05-20

Categories

Form: Attendance

Tags

Any

Linked Tags

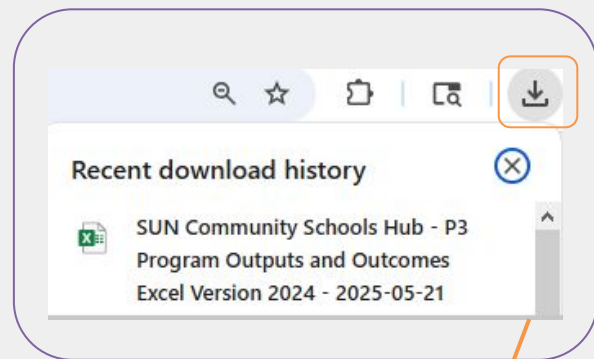
2024-2025

Linked Workspace Categories

Present

Generate report

Cancel



Find the Excel report in your **"downloads"** on your desktop and open the excel spreadsheet

Step 3) Review your data. Tab 1

Once you have open the report, you will see calculations happening on the report. Please allow time for the report to process the calculations (**bottom right hand corner**)

This report will contain three different progress tabs

The first tab is labeled **"P-3 Overview Summary"**

In this tab contains the following information:

-) **Site Names(s)**
(located in column A)
-) **Total P-3 enrolled activities**
(located in column B)
-) **Total Participants Served**
(located in column C)
-) **Total Children (0-5) Served**
(located in column D)
-) **Total P-3 Students (Kinder - 3rd) Served**
(located in column E)
-) **Total P-3 Adults (18+) Served**
(Located in column F)

	A	B	C	D	E	F
1	P-3 Sites	Total P-3 Activities	Total P-3 Participants	Total P-3 Children (0-5) Served	Total P-3 Students (Kinder - 3rd Grade) Served	Total P-3 Adults (18+) Served
2		9	130	67	0	63
3						
4						
5						
6						
7						
8						

P-3 Overview Summary

P-3 Play & Learn Summary

P-3 Parent Cafe Summary

Participant Details Tab

Data

Counts

Step 4) Review your data. Tab 2

The second tab in this report is labeled **"P-3 Play & Learn Summary"**

In this tab contains the following information:

-) **Site Names(s)**
(located in column A)
-) **Total Participants served at least once for P-3-Play and Learn Activities**
(located in column B)
-) **Number of participants that have been "present" at least 5 or more times for P-3-Play and Learn activities**
(located in column C)

	A	B	C	D
1	P-3 Sites	40 participants present at least once for Play and Learn	20 participants present 5 or more times for Play and Learn	
2		114	112	
3				
4				
5				
6				

P-3 Overview Summary

P-3 Play & Learn Summary

P-3 Parent Cafe Summary

Participant Details Tab

Data

Counts

Step 5) Review your data. Tab 3

The third tab in this report is labeled **"P-3 Parent Cafe Summary"**

In this tab contains the following information:

-) **Site Names(s)**
(located in column A)
-) **Total Adults (18+) served at least once for P-3-Parent Cafe activities**
(located in column B)

	A	B	D
		30 adults (18+) present at least once for Parent Café	
1	P-3 Sites		
2		28	
3			
4			

P-3 Overview Summary	P-3 Play & Learn Summary	P-3 Parent Cafe Summary	Participant Details Tab	Data	Counts
----------------------	--------------------------	--------------------------------	-------------------------	------	--------

Step 6) Review your data. Tab 4

The fourth tab in this report is labeled “Participant Details Tab”

This tab will contain the following:

- Agency Name
- School Name
- Participant information
- Years served in P-3 programming
- Number of Days Attended Total
- Number of Hours Attended Total
- Demographic Breakdown

Any required fields that are missing for P-3 Participants will be highlighted in yellow

A	B	E	F	G	H	I	J	K	L	M	N	O	Q	S	T
Agency Name	School Name	Client Unique Id / Workspace Number	SSID Number	Name	Enrollment Status	Date of Birth	Age	Gender	Language	Release to Participate (2026-2027)	Release of Information (2026-2027)	Risk Factors (Y/N)	Number of Days Attended: TOTAL	Number of Hours ATTENDED: TOTAL	Inclusive Identity
Mult Co	Grouptrail School	11111111	22222334	Test 1	Enrolled at this school	10/20/20	5	Man/Boy	Spanish	Yes	Yes	No	8	32.0	Latino/Hispanic
Mult Co	Grouptrail School	22222222		Test 2	Enrolled at this school	11/4/20	5	Man/Boy	English	Yes	Yes	No	8	32.0	White
Mult Co	Grouptrail School	33333333		Test 3	Enrolled at this school	2/19/21	5	Woman/Girl	English	Yes	Yes	No	7	28.0	Black/African American, White
Mult Co	Grouptrail School	44444444	55552334	Test 4	Enrolled at this school	5/10/21	5	Man/Boy	Spanish	Yes	Yes	Yes	8	32.0	Latino/Hispanic
Mult Co	Grouptrail School	55555555		Test 5	Enrolled at this school	1/21/21	5	Woman/Girl	English	Yes	Yes	No	8	32.0	African, White
Mult Co	Grouptrail School	66666666		Test 6	Enrolled at this school	8/24/21	5	Woman/Girl	English	Yes	Yes	No	8	32.0	White
Mult Co	Grouptrail School	77777777		Test 7	Enrolled at this school	12/9/20	5	Man/Boy	English	Missing	Missing	No	8	32.0	Black/African American, White
Mult Co	Grouptrail School	88888888		Test 8	Enrolled at this school	8/5/21	5	Woman/Girl	English	Missing	Missing	No	8	32.0	White
Mult Co	Grouptrail School	99999999	32425555	Test 9	Enrolled at this school	5/17/21	5	Woman/Girl	Spanish	Missing	Missing	Yes	6	24.0	Latino/Hispanic
Mult Co	Grouptrail School	111111110		Test 10	Other	9/2/25	1	Woman/Girl	English	Yes	Yes	No	3	12.0	Latino/Hispanic, White
Mult Co	Grouptrail School	122222221		Test 11	Enrolled at this school	10/28/20	5	Man/Boy	Other	Yes	Yes	Yes	1	4.0	White
Mult Co	Grouptrail School	133333332		Test 12	Enrolled at this school	5/20/21	5	Woman/Girl	Creole	Yes	No	Yes	3	12.0	Black/African American
Mult Co	Grouptrail School	144444443	213456789	Test 13	Enrolled at this school	11/22/16	9	Man/Boy	English	Yes	Yes	Yes	1	4.0	White
Mult Co	Grouptrail School	155555554		Test 14		12/12/89	36	Woman/Girl	Spanish	Yes	Yes		1	4.0	Latino/Hispanic
Mult Co	Grouptrail School	166666665		Test 15		1/7/81	45	Man/Boy	English	Yes	Yes		1	4.0	White
Mult Co	Grouptrail School	177777776		Test 16	Other	10/18/90	35	Woman/Girl	English	Yes	Yes		2	6.3	White
Mult Co	Grouptrail School	188888887		Test 17	Other	4/8/92	34	Man/Boy	English	Yes	Yes		1	4.0	Black/African American, White
Mult Co	Grouptrail School	199999998		Test 18	Other	12/1/92	33	Woman/Girl	English	Yes	Yes		1	4.0	Black/African American, White
Mult Co	Grouptrail School	2111111109		Test 19	Other	2/12/85	41	Woman/Girl	English	Yes	Yes		2	6.3	White
Mult Co	Grouptrail School	222222220		Test 20	Other	9/28/88	37	Man/Boy	English	Yes	Yes		1	4.0	White
Mult Co	Grouptrail School	233333331		Test 21	Other	9/9/85	41	Woman/Girl	English	Yes	Yes		1	4.0	Latino/Hispanic

P-3 Overview Summary
P-3 Play & Learn Summary
P-3 Parent Cafe Summary
Participant Details Tab
Data
Counts



4.2) O&O P-3 Demographic Summary Report

Please Note:

This section reviews how to generate and run the 4.2) O&O P-3 Demographic Summary Report in Grouptrail.

4.2) O&O P-3 Demographic Summary Report

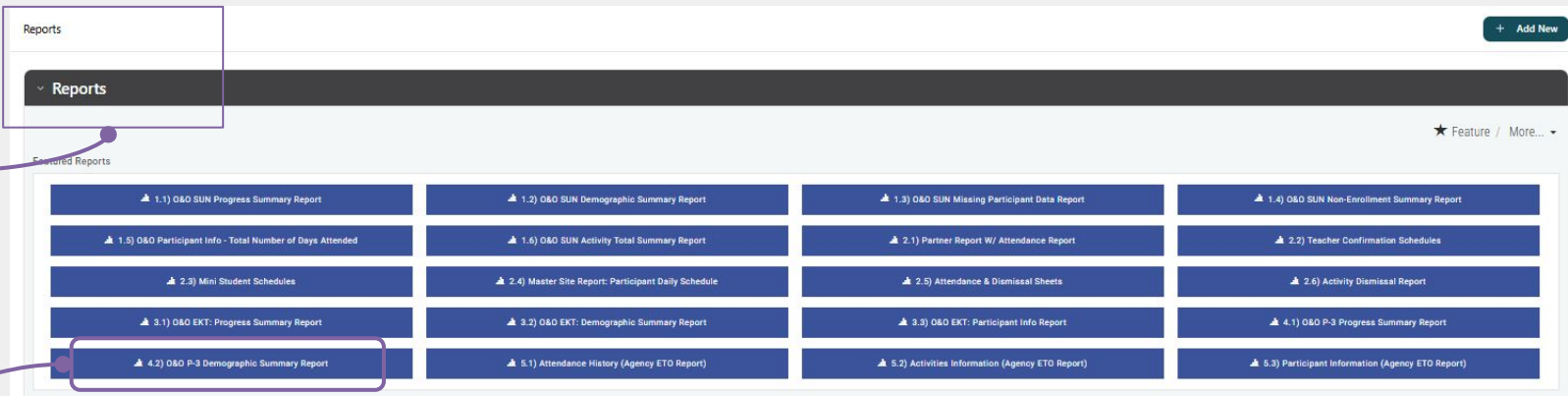
Reporting Context:

- This report in Grouptrail provides a breakdown of inclusive identities based on the P-3 participants a site is serving
- Users should keep in mind that inclusive identity totals will not equal 100%
- To view entire break down of inclusive identities, users should use the scroll bar to locate more data from left to right
- Included in the report will be the following information: Declined to Answer, Participants of Color and Primary Language Other Than English
- The report will take a user anywhere between 30 seconds to one minute to download
- If a user has multiple school access and generates this report for a long date range then the report may deliver via email to the user within 10 to 15 minutes
- This report contains Excel formulas meaning if a user clicks into a cell then it may break the data being viewed by the user
 - To avoid this issue, a user can copy and paste just the values in the report into a new Excel tab or Google Sheets
 - Here is quick YouTube video to demonstrate how to copy and paste values without formulas:
<https://www.youtube.com/watch?v=E2qBofQrAXY>

Step 1) Click on 4.2) O&O P-3 Demographic Summary Report

To Generate the 4.2) O&O P-3 Demographic Summary Report, go to your **Report Tracker** and click the correct report:

4.2) O&O P-3 Demographic Summary Report



Reports

▼ Reports

★ Feature / More... ▾

Featured Reports

▲ 1.1) O&O SUN Progress Summary Report	▲ 1.2) O&O SUN Demographic Summary Report	▲ 1.3) O&O SUN Missing Participant Data Report	▲ 1.4) O&O SUN Non-Enrollment Summary Report
▲ 1.5) O&O Participant Info - Total Number of Days Attended	▲ 1.6) O&O SUN Activity Total Summary Report	▲ 2.1) Partner Report W/ Attendance Report	▲ 2.2) Teacher Confirmation Schedules
▲ 2.3) Mini Student Schedules	▲ 2.4) Master Site Report: Participant Daily Schedule	▲ 2.5) Attendance & Dismissal Sheets	▲ 2.6) Activity Dismissal Report
▲ 3.1) O&O EKT: Progress Summary Report	▲ 3.2) O&O EKT: Demographic Summary Report	▲ 3.3) O&O EKT: Participant Info Report	▲ 4.1) O&O P-3 Progress Summary Report
▲ 4.2) O&O P-3 Demographic Summary Report	▲ 5.1) Attendance History (Agency ETO Report)	▲ 5.2) Activities Information (Agency ETO Report)	▲ 5.3) Participant Information (Agency ETO Report)

Step 2) Enter the Date Range you want to look at and click Generate Report.

Fill out the report prompt section by putting the **start** and **end** date you would like to generate data for (**Example: Just 1st, 2024 to May 20th, 2025**)

Once your dates are enter, click **"Generate Report"**

Find the Excel report in your **"downloads"** on your desktop and open the excel spreadsheet

Please Note: You do not need to change any of the filter options on the report prompt. You will only need to enter a "Start and End Date in the **date range fields**"

P-3 Demographic Summary Report (Excel Version 2024)

Filters

Filter date: Date of Activity

Range: Custom

From: To:

Categories: Form: Attendance

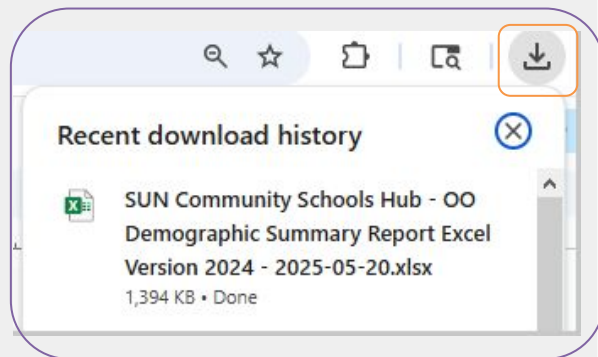
Tags: Any

Single submission forms/data types: Activities

Linked Tags: 2025-2026

Linked Workspace Categories: Present

Generate report **Cancel**





Step 3) Review your Demographic data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y		
Site		Total Served			African						Asian						Black / African American						Hispanic / L				
		Children (0-5)	Students (Kinder - 3rd)	Adults (18+)	Children (0-5)		Students (Kinder - 3rd Grade)		Adults (18+)		Children (0-5)		Students (Kinder - 3rd Grade)		Adults (18+)		Children (0-5)		Students (Kinder - 3rd Grade)		Adults (18+)		Children (0-5)	Students (Kinder - 3rd Grade)			
		N	N	N	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	
		38	5	52	5	13.2%	0	0.0%		3	5.8%	18	47.4%	2	40.0%	27	51.9%	4	10.5%	1	20.0%	3	5.8%	11	28.9%	1	20.0%

Once you have open the report, you will see calculations happening on the report, please allow time for the report to process the calculations (**bottom right hand corner**)

This report will contain an **inclusive identity breakdown** by **children (0-5)**, **student (K-3rd)** and **adult (18+)** participants

This report will contain the **number** of children, students and adults who selected the appropriate inclusive identity along with the **percentage**

To see more breakdown of site data, a user should scroll to the right in the report tab



Staff Workflow: Creating a Personalized P-3 Participant Tracker

Please Note:

This process reviews how to create a personalized P-3 participant tracker in Grouptrail to display all of your P-3 participants into one place. This process will allow you to have specific trackers for your P-3 data



Creating a personalized P-3 Participant Tracker (Step 1)

To manually
create a
participant
workspace, select
“Participants”
in your
navigation
window

The screenshot displays the Grouptrail web application interface. On the left is a vertical navigation sidebar with a header 'Welcome Rob!' and a hamburger menu icon. The sidebar contains a search bar with 'Home' entered, a 'Browse' dropdown, and a list of menu items: 'Activities', 'Account Holder (Parent/Gua...', 'Participants' (highlighted with a purple box and a purple arrow pointing to the text '“Participants”' in the callout), 'Grouptrail Announcements, ...', 'Reports', 'Site management', 'My Sites', and 'My Account'. At the bottom of the sidebar is a 'Sign Out' link. The main content area has a header 'Home' and an 'Add New' button. Below the header is a light blue announcement banner with a megaphone icon, the text 'Welcome! / ¡Bienvenides!', an 'Update' button, and a list of links for account holders, parents, and staff. At the bottom of the main area is a dark grey banner with the text 'FY27 Grouptrail Announcements and Updates'.

Welcome Rob! Home

Home

Browse

Activities

Account Holder (Parent/Gua...

Participants

Grouptrail Announcements, ...

Reports

Site management

My Sites

My Account

Sign Out

Home

+ Add New

Welcome! / ¡Bienvenides! Update

In the new version of Grouptrail v11, you no longer need the additional student registration form linked at the top. Parents/Guardians can more easily add students at any time!

- Account holder/parent/restricted user help articles: [Create an account and register](#), [Adding an additional participant](#), [Find activities and request enrollment](#)
- [Use this link](#) to test the full account holder/parent/restricted user workflow experience from registration to enrollment.
- And here are staff help articles: [How to create a new participant or activity](#), [Connect a new parent to an existing student record](#), [Marking duplicates for deletion](#), [Viewing staff reports](#), [Taking activity attendance](#), [Enrolling participants](#), [Frequently asked questions](#)

> FY27 Grouptrail Announcements and Updates



Creating a personalized P-3 Participant Tracker (Step 2)

Once you're in the **"Participants"** Menu view, click the icon called: **"Add New"** in the right hand corner to locate the one-page creation form





Creating a personalized P-3 Participant Tracker (Step 3)

Once you have selected the “**Add New**” icon,
you will now click on “**Tracker**”

Once clicked, you will be redirected to the
participant one-page creation form

Participants

+ Add New

> Participants (Active)

> Participants (Inactive)

Tracker

Participants

Creating a personalized P-3 Participant Tracker (Step 4)

+ Create a Tracker ×

1. Select the option of “**Search Filter**”, then click “**Choose Options**”

☒ **Search Filter**

Track a **subset of Workspaces /pages**. Choose your own filters or select a Group by option which allows you to easily make updates via drag 'n drop.

☐ **Featured Goal**

Track your site's **top ten goal tasks**.

☐ **Checklist**

Track **goal tasks** or **one-off (ad-hoc) tasks** with multiple filtering and grouping options. For one-off tasks, easily update assignees and due dates by drag 'n drop.

☐ **Goal Snapshot**

Track individual **goal scores** with a visual, color-coded snapshot showing overall progress and the drilldown status by topic.

☐ **Latest Activity**

Track **site updates** by user or activity type, such as message posts, form submissions, or task updates. You can also post comments and send email alerts from within the activity feed.

☐ **Reports**

Export and **download featured or system reports** as Excel spreadsheets.

☐ **Form Counts**

Choose a form and track **total answers submitted for each question**. Choose your own filters and view subtotals by user.

☐ **Status Counts**

Track **live counts of total Workspaces /pages** created, segments by your choice of tags (search labels).

Choose Options >

Creating a personalized P-3 Participant Tracker (Step 5)

Step 1: Name your Tracker:

“P-3 Participant Tracker”

(Add Current School in the parentheses)

- You can name your tracker anything you want for the year that you would like to view your participants for

Step 2: Change the “data category” the appropriate option you are creating a tracker for

In this case, you will select “participants”

+ Create a *Search Filter* Tracker 

< Back

Name Your Tracker

P-3 Participant Tracker (2024-2025)

Featured Options

Data Category

Forms/linked data categories

Group by

Other sites

Sort by

Participants

☐ Activities

☐ Account Holder (Parent/Guardian)

☒ Participants

☐ SUN Sites

☐ Providers

☐ Staff



Creating a personalized P-3 Participant Tracker (Step 6)

After you change the “data category” to participants scroll down and find a section called: “**Tag Filters**”

Once you have found that section, find the field called “**P-3 Participant? (Select Academic Year):**”

And click the **current academic year** that you would like to create the tracker for

This field will be located on the bottom for this section

If you cannot find the field, please click the green + button which will add more fields to select

+ Create a *Search Filter* Tracker ▼

◀ Back

Sort by A-Z

☐ Pin site featured

☐ Enable OR mode*
By default, results are limited to items that match all filters. Enabling this option shows either/or results.

Tag Filters

School Any

Provider Any

Enrollment Status Any

Gender Any

Current Grade Level Any

English Language Learner Any

Student lives with Any

P-3 Participant? (Select Academic Year):
P-3 ONLY

2024-2025

☒ 2024-2025

☐ 2025-2026

data category filters

None

Creating a personalized P-3 Participant Tracker (Step 6)

Once you have selected the P-3 participant field in the slide prior, scroll all the way to the bottom until you find the last two sections called:

- **Display Options**
- **Publish Options**

In **Display Options** section, select the following:

- Show Images
- Enable Filter
- Show Keyword Filter

In the **Publish Options** section, select any option that makes sense for your access (this is optional)

- Open tracker by default
- Pin to top of user dashboard

Once done, click **"Add to Dashboard"**

+ Create a *Search Filter* Tracker

Display Options

Show links to

(none)

☒ Show images
 ☒ Enable filter by options in tracker

☒ Show keyword filter

☐ Show last sync date and details
 ☐ Limit workspaces to those who were in sync this past week (Sunday to Monday)

Publish Options

☐ Open tracker by default
 ☐ Pin to top of User dashboard
 ☐ Feature tracker on top of User dashboard
 ☐ Require and show this tracker for all the users in this site

Or, show this tracker to these teams/users only:

Add to Dashboard

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Staff Workflow: Creating a Personalized P-3 Activity Tracker

Please Note:

This process reviews how to create a personalized P-3 activity tracker in Grouptrail to display all of your P-3 activities into one place. This process will allow you to have specific trackers for your P-3 data



Creating a personalized P-3 Activity Tracker (Step 1)

To create a workspace, select
“Activities”
in your
navigation
window

The screenshot displays the Grouptail user interface. On the left is a vertical navigation menu with a header 'Welcome Rob!' and a hamburger menu icon. The menu items are: Home (with a house icon), Browse (with a folder icon and a dropdown arrow), Activities (highlighted with a purple box and a purple line pointing to the text 'Activities' in the instruction), Account Holder (Parent/Gua...), Participants, Grouptail Announcements, ... (truncated), Reports (with a document icon), Site management (with a gear icon), My Sites (with a globe icon), and My Account (with a person icon). At the bottom of the menu is a 'Sign Out' link with an arrow icon. The main content area has a header 'Home' and an 'Add New' button with a plus icon. Below the header is a light blue announcement box with a megaphone icon, the text 'Welcome! / ¡Bienvenidos!', an 'Update' button, and a close button (X). The announcement text reads: 'In the new version of Grouptail v11, you no longer need the additional student registration form linked at the top. Parents/Guardians can more easily add students at any time!'. It lists three bullet points: 'Account holder/parent/restricted user help articles: [Create an account and register](#), [Adding an additional participant](#), [Find activities and request enrollment](#)', 'Use [this link](#) to test the full account holder/parent/restricted user workflow experience from registration to enrollment.', and 'And here are staff help articles: [How to create a new participant or activity](#), [Connect a new parent to an existing student record](#), [Marking duplicates for deletion](#), [Viewing staff reports](#), [Taking activity attendance](#), [Enrolling participants](#), [Frequently asked questions](#)'. Below the announcement box is a dark grey bar with the text '> FY27 Grouptail Announcements and Updates'.



Creating a personalized P-3 Activity Tracker (Step 2)

Once you're in the “**Activities**” Menu view, click the icon called: “**Add New**” in the right hand corner to locate the one-page creation form

Welcome Rob!

Home

Browse

Activities

Account Holder (Parent/G...

Participants

Grouptrail Announcement...

Reports

My Account

Activities

> Providers > All Activities Fall SUN 2026 (Example Tracker)

> Providers > All Activities Summer SUN 2026 (Example Tracker)

+ Add New



Creating a personalized P-3 Activity Tracker (Step 3)

Once you have selected the “**Add New**” icon,
you will now click “**Tracker**”

Once clicked, you will be redirected to the
activity one-page creation form

Activities

+ Add New

› Providers > All Activities Fall SUN 2026 (Example Tracker)

Tracker

Activities

› Providers > All Activities Summer SUN 2026 (Example Tracker)

Creating a personalized P-3 Activity Tracker (Step 4)

+ Create a Tracker ×

1. Select the option of “**Search Filter**”, then click “**Choose Options**”

☒ **Search Filter**

Track a **subset of Workspaces /pages**. Choose your own filters or select a Group by option which allows you to easily make updates via drag 'n drop.

☐ **Featured Goal**

Track your site's **top ten goal tasks**.

☐ **Checklist**

Track **goal tasks** or **one-off (ad-hoc) tasks** with multiple filtering and grouping options. For one-off tasks, easily update assignees and due dates by drag 'n drop.

☐ **Goal Snapshot**

Track individual **goal scores** with a visual, color-coded snapshot showing overall progress and the drilldown status by topic.

☐ **Latest Activity**

Track **site updates** by user or activity type, such as message posts, form submissions, or task updates. You can also post comments and send email alerts from within the activity feed.

☐ **Reports**

Export and **download featured or system reports** as Excel spreadsheets.

☐ **Form Counts**

Choose a form and track **total answers submitted for each question**. Choose your own filters and view subtotals by user.

☐ **Status Counts**

Track **live counts of total Workspaces /pages** created, segments by your choice of tags (search labels).

Choose Options >

Creating a personalized P-3 Activity Tracker (Step 5)

Step 1: Name your Tracker:

“P-3 Activity

Tracker (Add Current School in the parentheses)

- You can name your tracker anything you want for the year that you would like to view your activities for

Step 2: Change the **“data category”** the appropriate option you are creating a tracker for

In this case, you will select **“activities”**

+ Create a *Search Filter* Tracker 

< Back

Name Your Tracker

P-3 Activity Tracker (2024-2025)

Featured Options

Data Category

Forms/linked data categories

Group by

Other sites

Sort by

Activities

☒ Activities

☐ Account Holder (Parent/Guardian)

☐ Participants

☐ SUN Sites

☐ Providers

☐ Staff

Creating a personalized P-3 Activity Tracker (Step 6)

After you change the “data category” to activities scroll down and find a section called: **“Tag Filters”**

Once you have found that section, find the field called **“Is this a P-3 Activity?”**

And select the option of **“Yes”**

This field will be located on the bottom for this section

Tag Filters

☐ Enable OR mode*
By default, results are limited to items that match all filters. Enabling this option shows either/or results.

School

Any

Activity Category

Any

Activity Subject

Any

Provider

Any

Current Grade Level

Any

Primary Method of Transportation

Any

Time offered

Any

Is this a P-3 Activity?

Yes

☒ Yes

Activity Term

Creating a personalized P-3 Activity Tracker (Step 7)

After you have updated the “Tag Filter” section scroll down and find a section called: **“Date Filter”**

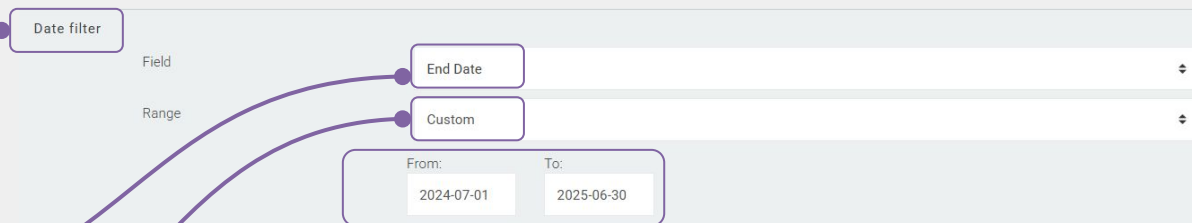
Once you have found that section, update the following:

- **Field**
- **Range**
- **Dates**

For the section of **“Field”** choose the date selection of **“End Date”**

For the section of **“Range”** choose the range selection to **“Custom”**

For the section of **“Dates”** choose the range to **July 1st - June 30th** (these dates should reflect the current school year we are in)



The screenshot shows the 'Date filter' settings interface. It has two main sections: 'Field' and 'Range'. The 'Field' section has a dropdown menu with 'End Date' selected. The 'Range' section has a dropdown menu with 'Custom' selected. Below these is a 'Dates' section with two input fields: 'From:' and 'To:'. The 'From:' field contains '2024-07-01' and the 'To:' field contains '2025-06-30'. Purple lines with dots at the end point from the text instructions to the corresponding UI elements: 'Date filter' points to the title, 'Field' points to the 'End Date' dropdown, 'Range' points to the 'Custom' dropdown, and 'Dates' points to the date range inputs.

Creating a personalized P-3 Activity Tracker (Step 8)

Once you filled out the date field section in the previous slide, scroll all the way to the bottom until you find the last two sections called:

- **Display Options**
- **Publish Options**

In **Display Options** section, select the following:

- Show Images
- Enable Filter
- Show Keyword Filter

In the **Publish Options** section, select any option that makes sense for your access (this is optional)

- Open tracker by default
- Pin to top of user dashboard

Once done, click **"Add to Dashboard"**

+ Create a *Search Filter* Tracker

Display Options

Show links to

(none)

☒ Show images
 ☒ Enable filter by options in tracker

☒ Show keyword filter

☐ Show last sync date and details
 ☐ Limit workspaces to those who were in sync this past week (Sunday to Monday)

Publish Options

☐ Open tracker by default
 ☐ Pin to top of User dashboard
 ☐ Feature tracker on top of User dashboard
 ☐ Require and show this tracker for all the users in this site

Or, show this tracker to these teams/users only:

Add to Dashboard

48



Thank you!

Multnomah County

Youth & Family Services

SUN Service System Data Team

yfsdatasupport@multco.us